

Message Text

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ACTION EA-10

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R 280600Z MAY 75

FM AMEMBASSY SINGAPORE

TO SECSTATE WASHDC 2675

USDOC WASHDC

INFO AMEMBASSY JAKARTA

AMEMBASSY KUALA LUMPUR

AMEMBASSY MANILA

AMCONGEN HONG KONG

AMCON MEDAN

AMCON SURABAYA

UNCLAS SINGAPORE 2264

E. O. 11652: N/A

TAGS: BEXP, SN

SUBJECT: MARKET BRIEF: INDUSTRIAL AND COMMERCIAL SECURITY DEVICES
AND SYSTEMS.

REF: A. STATE A-1742 OF 3/13/75, B. STATE 090058, 4/18/75,

C. STATE 07926, 5/23/75, D. JAKARTA 6075, 5/20/75,

E. HONG KONG 4693, 4/30/75, F. MANILA 4613, 4/14/75.

USDOC FOR BIC/OIM

SUMMARY

ON BASIS OF PUBLISHED MARKET DATA, AND BRIEF SURVEY
SUGGESTED REFAIR (A), EMBASSY FEELS SINGAPORE MARKET FOR
INDUSTRIAL AND COMMERCIAL SECURITY DEVICES IS RATHER
LIMITED. IMPORTS FROM U.S. OF APPROXIMATELY US \$800,000
COMPRISE 6 PERCENT OF TOTAL SALES. MARKET DOMINATED BY LOW-
PRICED IMPORTS FROM ASIAN COUNTRIES. IN MEDIUM TERM, GROWTH
PROSPECTS FOR SALES RATHER FLAT, DUE
TO SLOWDOWN IN PRIVATE CONSTRUCTIONM END SUMMARY.

1. SIZE OF MARKET (IN US \$1,000)

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SITC 1971 1972 1973 1974

A. 698110 -LOCKS AND PADLOCKS\$"BASE METAL

IMPORTS	3537	4548	7032	8730
EXPORTS	534	779	1135	1294
CONSUMPTION	3003	3766	5897	7436

B. 698121 -BOLTS, HASPS AND HINGES, BASE METAL

IMPORTS	539	889	1616	1934
EXPORTS	60	48	91	125
CONSUMPTION	479	841	1525	1808

C. 698201-SAFES, STRONG ROOM DOORS, SAFE DEPOSIT BOXES

IMPORTS	750	841	813	1097
EXPORTS	61	47	64	123
CONSUMPTION	689	794	749	974

D. 729940- ELECTRICAL SOUND AND VISUAL SIGNALLING APPARATUS

IMPORTS	830	644	876	1189
EXPORTS	56	105	131	118
CONSUMPTION	774	539	745	1071

TOTALS:

IMPORTS	16	YOWP	10339	12951
EXPORTS	712	980	1422	1661
CONSUMPTION	4945	5940	8917	11290

2. THE CATEGORY "CASH, DEED, AND MONEY BOXES" HAS BEEN DROPPED BECAUSE CONSUMPTION IN SINGAPORE IS NEGLIGABLE.

3. LOCAL PRODUCTION OF ALL ITEMS, BASED ON 1973 SURVEY OF INDUSTRIAL PRODUCTION AND SURVEY RESPONDENTS, IS INSIGNIFICANT WITH THE EXCEPTION (STATISTICS ARE NOT AVAILABLE) OF SIMPLE FIRE AND SECURITY ALARM PANELS ASSEMBLED LOCALLY.

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4. CURRENT (1974) SINGAPORE IMPORTS ALL CATEGORIES INDUSTRIAL AND COMMERCIAL SECURITY DEVICES TOTALLED US \$13 MILLION. CONSUMPTION (IMPORTS MINUS EXPORTS) WAS US \$11.3 MILLION. EXPORTS OF US \$1.7 MILLION WERE PRIMARILY RESHIPMENTS TO MALAYSIA. U.S. SHARE OF TOTAL MARKET WAS ONLY SIX PERCENT, AND TOTAL U.S. SALES ONLY \$819,000. MARKET WAS DOMINATED BY THE U.K. AND PRC (EACH 23 PERCENT) AND JAPAN (16PERCENT). U.S. WAS MOST COMPETITIVE IN ELECTRICAL SOUND/SIGNALLING APPARATUS (17 PERCENT) AND SAFES (15 PERCENT). HOWEVER, BULK OF IMPORTS, OVER US \$10.6 MILLION, WERE FOR LOCKS. BOLTS, GASPS, AND HINGES. COST, NOT QUALITY, IS MAIN PURCHASING MOTIVATION FOR THESE ITEMS.

5. IN VALUE TERMS, OVERALL MARKET GREW AT ANNUAL RATE OF 50 PERCENT 1973, AND 25 PERCENT IN 1974, 1974 GROWTH DUE LARGELY TO INFLATION, 1973 TO CONSTRUCTION BOOM. CONSTRUCTION HAS NOW FALLEN OFF SHARPLY, WITH EXCEPTION OF PUBLIC HOUSING. THUS, ANTICIPATE MARKET WILL BE FLAT FOR NEXT YEAR TWO.

6. MARKET FOR HIGH-TECHNOLOGY PRODUCTS OF KIND U.S. CAN PRODUCE COMPETITIVELY IS EXTREMELY SMALL. THUS, FEW POTENTIAL "BEST SELLERS". HOWEVER, U.S. GENERALLY MORE COMPETITIVE DUE TO CURRENCY REALIGNMENTS, AND COULD PERHAPS WIN U.S. A SOMEWHAT LARGER SHARE OF HIGH-QUALITY LOCK MARKET. PROSPEROUS AND GROWING SHIPBUILDING/OIL RIG INDUSTRY PROVIDES OPPORTUNITIES FOR SALES FIRE ALARM SYSTEMS ABOARD SHIPS. LOCAL AGENT WHO CAN BID ON INSTALLATION IS HOWEVER, ESSENTIAL.

7. NEGLIGIBLE EFFECTIVE DEMAND AT PRESENT APPEARS TO EXIST FOR SOPHISTICATED ELECTRONIC, ULTRASONIC, AND INFRARED ALARM SYSTEMS. WHILE SOME MARKET DOES EXIST FOR COMPLETE BUILDING AUTOMATION SYSTEMS, NONE OF BUILDING CONTROL SYSTEM PACKAGES INSTALLED TO DATE HAVE HAD SECURITY BUILT IN. IN ABSENCE THESE SYSTEMS, PORT AUTHORITY, AIRPORT, AND INDUSTRIES NOW RELYING LARGELY ON MANPOWER ALONE FOR PROTECTION. SEVERAL AGENTS EXPRESSED HOPE A SHOW WOULD BE HELD AS MISSIONARY EFFORT TO EDUCATE THE MARKET TO USES OF SUCH SOPHISTICATED SECURITY DEVICES.

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8. NO PARTICULAR REQUIREMENTS EXIST ON METAL CASING OR STAND-BY BATTERY LIFE. ALSO NO CODE REQUIREMENT FOR METRIC, BUT CONVERSION STRONGLY ENCOURAGED BY SINGAPORE GOVERNMENT.

9. IN SUM, RESEARCH INDICATES THIS THEME IS NARROW FOR EXISTING SINGAPORE MARKET. LIKELIHOOD OF STRONG REGIONAL DRAW ALSO DOES NOT SEEM GREAT AT THIS TIME(SEE REFTELS D. E, AND F). EMBASSY THEREFORE WOULD LIKE TO SEE A STRONGER THEME FOR USRTC EVENT IF SUBSTITUTION IS POSSIBLE. ALTERNATIVELY, THIS THEME COULD BE BROADENED TO INCLUDE OTHER TYPES OF PROPERTY PROTECTION EQUIPMENT, E.G., FIRE PREVENTION AND FIRE FIGHTING EQUIPMENT AND SYSTEMS.

10. LISTS OF POTENTIAL AGENTS AND END-USERS BEING POUCHED SEPARATELY.
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